



Administer Workforce Division

HRIS 8.3

Revised June 2003

Administer Workforce Division HRIS 8.3

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Overview of HRIS Version 8.3

The HRIS Version 8 Tutorial and Navigation Course cover the basic version 8 terminology and functionality. This document will not cover specifics of what has already been covered by the on-line applications. Some basic shortcuts and terminology are listed in Appendix A and Appendix B.

Basic Procedures

Logging on to HRIS 8.3 Training Database

Note: Production procedures will be the same as the training procedures only the database name will change.

- HRQA is for Training
- HRPRD will be for production (same as 7.51, the name does not change).

Login Procedure

The url for HRPRD is: <http://hrsrv.lbl.gov:8000/servlets/iclientservlet/HRPRD/?cmd=start&>

1. Using Internet Explorer, type “<http://HRIS.LBL.GOV/HRPRD>” in the URL, the login page will display
2. Enter your PeopleSoft Operator ID (case sensitive)
3. Enter your password (case sensitive)
4. The window opens to the Home page with your menu groups.

Changing your Password

Roadmap

[Home](#) > [PeopleTools](#) > [Maintain Security](#) > [Use](#) > My Profile

Procedure

1. Once you've logged into PeopleSoft
2. Follow the path: [Home](#) > [PeopleTools](#) > [Maintain Security](#) > [Use](#) > My Profile
3. Click on [Change Password](#) link
4. Enter your **current Password**, tab
5. Enter a **new Password** (Reminder: Case sensitive, LBL policy, etc), tab
6. Confirm the **new Password**
7. Click **OK**, then click the **Save** button
8. Go back to **Home** to exit the password pages

Access to Records, Data and Pages

All HR Center staff will be assigned the same "Role" for accessing the parts of the system you need to work in. You should all have the same access to complete assigned duties.

Your access may include the following:

1. Administer Workforce (GBL) – Lab wide view access to Personal Data, Job Data, Identification Data, Emergency Contact, and Track Education. Includes all employee classifications.
2. Administer Workforce Division – Division specific access for records in your assigned Level 1(s). Update privileges on these records are restricted to; update Personal Data, Employment Data, Emergency Contact, and Track Education and use of special panels for Division Orgcode Data changes, Supervisor ID changes, and HEERA changes.
3. Administer Guest - Lab wide access to guest records. Includes privileges to view and update Personal Data, Job Data, Emergency Contact, and Track Education. This access can do all actions except correction and update in the Identification Data pages.
4. Recruit Workforce (GBL) – Lab wide access to Job Requisition, Applicant Activity, and Hiring an Applicant.

Optional Access includes:

1. Salary Administration – Working in the Salary Administration Grid
2. Employee Review – working in the Employee Review pages
3. Administer Training – lab wide access to create Training Courses and maintain enrollment status for employee and guests.

Data Correction and End User Support

Correction of incorrect effective dated data should be sent to Payroll@lbl.gov. If you have access to change data then by all means.... Do it!

Duplicate ID numbers, value list changes, table, and any other squirrely problems should be sent to HRIS@lbl.gov.

Dagny Miurduchann	x6588	Recruitment and Administer Guest
Amy Lowe	x5044	Administer Workforce, Administer Training, and Plan Salaries
Angela Dawn	x7873	Value lists, Institution/School Tables, and Query Basics
Cynthia Coolahan	x6431	System Security and Access
Ben Ortega	x6326	Questions regarding Foreign Nationals, Visas, Citizenship and Degree Verification.
Mary Bishop	x5270	Questions regarding Policy and the RPM
Payroll	x6543	Data correction, pay issues, tax questions, PAF processing, etc.
Benefits	x6403	Health and Welfare questions, Benefit program eligibility

Functionality

HRIS Version 8.3 functionality is basically the same as 7.51. An employee record has the same components and these components relate to one another in the same fashion.

Some data fields have moved to new page locations and some pages have moved to new component locations.

Some Important Changes are:

1. **Citizenship Status** is now on the Identification Data – Citizenship/Passport page and is updated by International Researcher and Scholars Office (IRSO).
2. **Gender** and **Highest Ed Level** are on the Personal Data – Personal Information page that is now effective dated, you must insert a row to edit.
3. **LBNL Directory** has moved to the Personal Data component.
4. **Name** is a calculated field, it combines the separate entries for First, Middle and Last name fields.
5. **Union Code** is on the Job Data – LBNL Miscellaneous page.
6. The “Calculate Compensation” button on the Compensation page populates the **Comp Rate**.
7. **Employment Data** and **Benefits Participation Program** components can only be access through the links on the Job Data component. In other words they are like sub-components of Job Data.

A complete listing of the Components and the fields on these Components is available in Appendix B.

Data Entry and Maintenance Procedures

Overview

This document defines the specific LBNL procedures for actions that users with Division level access in the HRIS database.

In this document covers how to:

Enter and change non-effective dated records including:

- ⇒ Personal Data Non-Effective Dated pages LBNL Directory Info, Service Dates
- ⇒ Employment Data Dates like Appt End Date and Service Date
- ⇒ Emergency Contact Data
- ⇒ Track Education Data

Enter and change effective dated records including:

- ⇒ Name History
- ⇒ Address History
- ⇒ Supervisor ID
- ⇒ Organization Code
- ⇒ HEERA Status Changes

Personal Data: Name, Address, Personal Profile - Effective Dated

The Name, Address and Personal Profile pages contain name, home and mailing address information, gender, and highest education level, etc. In version 8.3 these pages are effective dated. Insert a row, change data, then save.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Personal Data

Procedure

1. In the Administer Workforce Division access, select **Use**.
2. Select **Personal Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **OK**, *The Name History page will display.*
5. Click the **tab** for the data you wish to update (other than Name).
6. On the page you wish to update, Click the **Insert Row (+)** button
7. Enter the **Effective Date** of the new data and update any fields as necessary.
8. Click **Save**.

Personal Data: Identity/Diversity, Veteran Status, Citizenship or LBNL Directory – Non-Effective Dated

The Identity/Diversity page contains Birthdate and SS# information, Citizenship contains Country and U.S. Citizenship Status, and LBNL Directory contains office location and phone information. These pages are non-effective dated pages. To update data simply type over the data that is already in the field and save.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Personal Data

Procedure

1. In the Administer Workforce Division access, Click **Use**.
2. Click **Personal Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Address History page or list will display. If list, click the link for the record you wish to update.*
5. Click the **tab** for the data you wish to update.
6. **Edit** fields as necessary.
7. Click **Save**.

Emergency Contact: Non-Effective Dated

The Emergency Contact page has no effective date, and more than one emergency contact may be inserted for an employee.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Emergency Contact

Procedure

1. In the Administer Workforce Division access, select **Use**.
2. Click **Emergency Contact**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Contact Address/Phone page or list will display. If list, click the link for the record you wish to update.*
5. **Update** the fields as necessary. Click the Other Phone tab to add additional phones.
6. Click the **Insert Row (+)** button to insert multiple contact or phone information.

Note: May have multiple instances but only one can be the primary.

Note: Each contact may have multiple instances of phones.

7. Click **Save**.

Appointment End Date: Non-Effective Dated

Appointment a single occurrence, non-effective dated field.

Note: HR Center Staff and Guest Processors may do Extension of Appointments for Guest, Contract Workers and Students only. Extensions for other employee classifications must be done by payroll, send a Personnel Action Form (PAF) to payroll for processing.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Job Data

Link to [Employment Data](#)

Procedure

1. In the Administer Workforce Division access, select **Use**.
2. Click **Job Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Work Location page or list will display. If list, click the link for the record you wish to update.*
5. The Work Location page will display, Click the **Employment Data link** at the bottom of the page. *The Employment Data page will display.*
6. **Update** the Appointment End Date.
7. Click **Save**.

Supervisor ID: Effective Dated

Supervisor ID is a effective dated field on the Job Data page. The Job Data page is directly available for HRCenter staff and Guest Processors to update. A special page has been developed to provide users with access to insert the Job Data Row and update the Supervisor field.

Field Staff may only add a **Current row** of data. This means if there is an existing data row in the way or in the future, HR Center staff may not do the data entry. In this case, send your change by PAF to payroll for entry.

To correct a **History row** where the Supervisor ID is wrong, send an email to payroll@lbl.gov. To add a history row for a retroactive action or correction, send a PAF to payroll for data entry.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Change Supervisor

Procedure

1. In the Administer Workforce Division access, select **Use**.
2. Click **Change Supervisor ID**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Change Supervisor ID page or list will display. If a results list appears, click the link for the record you wish to update.*
5. Click **Insert Row (+)**, to create the new data row for update.
6. Update the **Effective Date**.
This date should reflect the exact effective date.
7. **Action** and **Reason** fields will auto fill, **(STC/SUP)**
8. Click into the inner frame and update the Supervisor ID field, as required.
9. Click **Save**.

Organization Codes: Effective Dated

Organization code is an effective-dated update. This means that you will need to insert a new record, update the information and save the information. The new row does not change the old information, *it adds another layer and the old information will be saved as a history.*

Center Staff may only add a **Current row** of data. This means if there is an existing data row in the way or in the future, HR Center staff may not do the data entry. In this case, send your change by PAF to payroll for entry.

To correct a **History row** where the Orgcode is wrong, send an email to payroll@lbl.gov. To add a history row for a retroactive action or correction, send a PAF to payroll for data entry.

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Division Orgcode Data

Procedure

1. In the Administer Workforce Division access, select **Use**.
2. Click **Division Orgcode Data**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Orgcode Data page or list will display. If list, click the link for the record you wish to update.*
5. Click **Insert Row (+)**, to create the new data row for update.
6. Update the **Effective Date**.
This date should reflect the exact effective date.
7. **Action** and **Reason** fields will auto fill, **(Transfer/REO)**
8. Click into the inner frame for the Org Code and change the **Level 1, Level 2, and Level 3** or **Level 4**, as required.
9. To insert a second organization code assignment, Click **Insert Row (+)** from within the Org code inner frame, a second occurrence of the org code fields will display for entry.
10. Click **Save**.

HEERA Status: Effective Dated

The HEERA Status is often done in conjunction with a job class change but not always. The HEERA data field is used for labwide reporting and should be updated regularly.

A special panel has been developed to allow HR Center staff to update HEERA status as needed. To update HEERA status a new Job Data row must be created and updated.

Field Staff may only add a **Current row** of data. This means if there is an existing data row in the way or in the future, HR Center staff may not do the data entry. In this case, send your change by PAF to payroll for entry.

To correct a **History row** where the HEERA is wrong, send an email to payroll@lbl.gov. To add a history row for a retroactive action or correction, send a PAF to payroll for data entry.

Roadmap

Home > Administer Workforce > Administer Workforce Division > Use > Change HEERA
--

Procedure

1. In the Administer Workforce Division access, select **Use**.
2. Click **Change HEERA**. *The Find an Existing Value page will display.*
3. **Enter the Employee ID** or use the name search fields.
4. Click **Search**, *The Change HEERA page or list will display. If list, click the link for the record you wish to update.*
5. Click **Insert Row (+)**, to create the new data row for update.
6. Update the **Effective Date**.
This date should reflect the exact effective date.
7. **Action** and **Reason** fields will auto fill, **Stat Chg/APP** (Appointment Type Change).
8. Tab to the **HEERA Status** field and update the data
9. Click **Save**.

Historical Name Searches

1. The HIRE process automatically puts you in ADD mode to create a new record.
2. ALWAYS do a **Historical Employee** search by name and partial name to determine if any other numbers exist for the person.
3. Never HIRE an employee who already has an existing record with a valid ID number. The existing record must be a termination action. The correct system action is REHIRE after the termination action.

NOTE: Valid ID numbers for HRIS records are 6-character numeric only.

1. **Any numbers starting with a “P” are old and invalid and must be evaluated. If possible, a “P” number should be converted to a valid number before any actions are entered.**
2. **Multiple numbers for a person may constitute an invalid number situation. Correction of invalid employee numbers or multiple records for any person are sent to HRIS@ibl.gov.**

Investigating Historical ID Numbers

Roadmap

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Historical Employees

Procedure

1. In the Administer Workforce Division access, select **Use**.
2. Click **Historical Employees**. *The Find an Existing Value page will display.*
3. Use the **name search fields** to find records with the requested name.
4. Click **Search**, *The Historical Employees page or list will display. If list, click the link for the record you wish to view.*
5. The Historical Employees data page displays for your review.
6. Use the **Next in List /Previous in List** to compare the data for like names.

Using the Correction Action

The Correction mode is reserved for use on records requiring specific correction of data. Records may be correct in the current or the historical status.

Correction mode is to be used only for correction of data, not during the regular maintenance of records. This will increase the integrity of data.

If correction is made to any field in history, that same change must be made in all subsequent records.

Procedure

Request Correction of An employee records via email to payroll@lbl.gov.

Questions? Contact hris@lbl.gov

Page Definitions

The following pages are description of the pages and the data available on those pages. Many fields are new in version 8 and they are not used. We have tried to minimize the customization to the PeopleSoft delivered application so you will notice that many items remain both on the menus, component list and the pages.

Please disregard items that are listed and 'Not Used'. Help us to minimize the customizations.

To get to specific pages and fields the following Roadmaps may be useful:

Personal Data (Address, Name, Highest Ed Level, Gender, Ethnicity, Veteran Status, Citizenship Status)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Personal Data

Job Data (Job Code, Empl_class, Comprate, etc.)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Job Data

Employment Data (Supervisor ID and Appt End Date)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Job Data

Track Education

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Track Education

Emergency Contact

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Emergency Contact

Passport/Visa Data (Citizenship Status)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > Identification Data

Personal Data

Name History

This page is effective dated. Only Name Type: Primary is used here at Berkeley Lab. Name data is entered in separate fields for First, Middle, Last, and Suffix, the concatenated Name field is populated by clicking the “Refresh the Name Field” button. Laboratory guests and employees should update this page using the Employee self-service web site. Send corrections to payroll@lbl.gov

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce Division > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity Veteran Status Citizenship

EmplID: 008051 Employee

Name Type First 1 of 1 Last

*Type of Name: Primary

Name History First 1 of 1 Last

*Effective Date: 09/26/2002

Format Using: USA United States Refresh the Name Field

Person Name

Prefix: First: Hari Middle: Last: Shroff Suffix: Name: Shroff, Hari

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [Veteran Status](#) | [Citizenship](#) | [LBL Personal Data](#) | [LBL Directory](#)

Req	Field Name	Type	Description
*	Type of Name	VL	Must be “Primary”
*	Effective Date	DT	Enter Date of Hire or Date of name change
	Format Using	LU	Defaults to USA – do not edit
	Prefix	—	Not used – leave blank
*	First	—	Enter first name (case sensitive)
	Middle	—	Enter middle name or initial (case sensitive), No period (.)
*	Last	—	Enter last name (case sensitive)
	Suffix	LU	Select from value list if applicable
*	Name	—	Click the “Refresh the Name Field” button to populate

* Required Field

Address History

This page is effective dated. Only Address Type “Home” and “Mail” are used here at Berkeley Lab. Laboratory guests and employees should update this page using the Employee self-service web site. Send corrections to payroll@lbl.gov

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce Division > Use > Personal Data

Name History Address History Personal History Identity/Diversity Veteran Status Citizenship LBNL Personal Data

Shroff, Hari Employee EmplID: 008051

Address Type View All First 1 of 2 Last

*Address Type: HOME

Address History View All First 1 of 1 Last

*Effective Date: 09/26/2002 *Status: Active

Country: USA United States

Address 1: 3005 Ellis St., Apt F

Address 2:

City: Berkeley

County:

Postal: 94703

State: CA California

Phones First 1 of 1 Last

*Phone Type Telephone

Main 510/665-4763

Email Addresses First 1 of 1 Last

*Email Type *Email Address

Save Return to Search Previous tab Next tab Refresh Update/Display Include History Correct History

Name History | Address History | Personal History | Identity/Diversity | Veteran Status | Citizenship | LBNL Personal Data | LBNL Directory

Req	Field Name	Type	Description
*	Address Type	VL	Must be “Home” or “Mail”, use value list
*	Effective Date	DT	Enter Date of Hire or Date of new address
	Status	VL	Defaults to “Active” – most recent effdt determines current
*	Country	LU	Enter Country Code, use lookup if necessary. Default: USA
*	Address 1:	—	Enter Street Address, unit number ok here – no abbreviations
	Address 2:	—	Enter Apartment/Unit # or additional address info as needed
	Address 3:	—	Optional as needed
	Address 4	—	Optional as needed
*	City	—	Enter City name
	County	—	Not used
*	Postal	—	Enter zip code – format checking
	Province	LU	Not used
*	Phone Type	VL	Enter “Main”, use value list
*	Telephone	—	Enter home phone number for address above
	Email Type	VL	Not used
	Email Address	—	Not used here – email is on Guest Info for guests’ private accounts or LBNL Directory for lbl.gov accounts.

*Required Field

Personal History

This page is effective dated you must insert a new row to update. Send corrections to payroll@lbl.gov

The screenshot shows the 'Personal Data' form for employee Shroff, Hari (EmplID: 008051). The form includes tabs for Name History, Address History, Personal History (selected), Identity/Diversity, Veteran Status, and Citizenship. Fields include:

- *Effective Date: 09/26/2002
- *Gender: Male
- *Highest Education Level: A-Not Indicated
- Language Code: English
- *Marital Status: Single
- As of: (empty)
- ☒ Full-Time Student
- USA section with Date Entitled to Medicare (empty) and ☐ Eligible to Work in U.S.
- Employment Eligibility Proof section with two empty input fields labeled 1 and 2.


 Navigation buttons at the bottom include Save, Return to Search, Previous tab, Next tab, Refresh, Update/Display, Include History, and Correct History. A breadcrumb trail at the bottom reads: Name History | Address History | Personal History | Identity/Diversity | Veteran Status | Citizenship | LBNL Personal Data | LBNL Directory.

Req	Field Name	Type	Description
*	Effective Date	DT	Enter Date of Hire or date of data change
*	Gender	VL	Enter Gender, use value list
*	Higher Education Level	VL	Enter "highest education level", use value list. Degree data must be in Track Education tab
	Language Code	VL	Default: "English" – do not edit
	Marital Status	VL	Not Used – do not edit, Default: "Single"
	As of	DT	Not Used
	Full-Time Student	CB	Check box if employee is full time student
	Date Entitled to Medicare	DT	Not Used
	Eligible to Work in U.S.	CK	Not Used
	Employment Eligibility Proof		Not Used

* Required Field

Identity/Diversity

This page is not effective dated, to update simply edit the field and save the new data.


Home Help Sign Out

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > [Personal Data](#)
New Window

[Name History](#) [Address History](#) [Personal History](#) [Identity/Diversity](#) [Veteran Status](#) [Citizenship](#)

Shroff, Hari Employee EmplID: 008051

Date of Birth: 05/07/1982
 Birth Country:

Age: Years 21 Months 0
 Birth Location:

Date of Death:
 Original Hire Date: 09/26/2002

☐ Waive Data Protection

USA

National ID
 View All First 1 of 1 Last

Country	National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	999999999	<input checked="" type="checkbox"/> + -

USA

Ethnic Self Identification: A White (not of Hispanic origin)

Ethnic Group: 1 White

Save Return to Search Previous tab Next tab Refresh

Update/Display Include History Correct History

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [Veteran Status](#) | [Citizenship](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
*	Date of Birth	DT	Enter Employee Birthdate (mm/dd/yyyy)
	Age	—	Auto calculated age data as of current date
	Date of Death	DT	Enter as necessary
	Birth Country	LU	Enter if known, use lookup – IRSO completes if data is known
	State	LU	Enter if known, use lookup – IRSO completes if data is known
	Birth Location	—	Enter if known, use lookup – IRSO completes if data is known
	Waive Date Protection	CB	Not used
	Original Hire Date	DT	Auto fills by system – date of first record in HRIS
	Country	—	Default: “USA”, view only
	National ID Type	—	Default: “PR”, view only
	Description	—	Default: “Social Security Number”, view only
*	National ID	—	Enter SS#, no field formatting. Data checked for valid # and duplicates.
	Primary ID	—	Default: “checked”, view only
*	Ethnic Self Identification	LU	Enter data. Use value list. If employee has declined to identify, use “unknown”. Employee can update through Self Service.

* Required Field

Veteran Status

This page is not effective dated, to update simply edit the field and save the new data. Laboratory guests and employees should update this page using the Employee self-service web site.

PEOPLE Soft

Home Help Sign Out

Home > Administer Workforce > Administer Workforce Division > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity/Diversity Veteran Status Citizenship

Shroff, Hari Employee EmplID: 008051

☐ Vietnam Era Veteran Status
 ☐ War/Campaign/Expedition Status
☐ Disabled Veteran
 ☐ Disabled

Veteran Separation Date:

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[Name History](#) |
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 [Personal History](#) |
 [Identity/Diversity](#) |
 [Veteran Status](#) |
 [Citizenship](#) |
 [LBNL Personal Data](#) |
 [LBNL Directory](#)

Req	Field Name	Type	Description
	Vietnam Era Veteran Status	CB	Check if known, Employee enters through self service
	Disabled Veteran	CB	Check if known, Employee enters through self service
	War/Campaign.Expedition Status	CB	Check if known, Employee enters through self service
	Disabled	CB	Check if known, Employee enters through self service
	Veteran Separation Date	DT	Enter if known, Employee enters through self service

Citizenship

This page is not effective dated, to update simply edit the field and save the new data.

The screenshot shows the 'Citizenship' page for employee Shroff, Hari (EmpID: 008051). The page has a blue header with the 'PEOPLE Soft' logo and navigation links for Home, Help, and Sign Out. Below the header is a breadcrumb trail: Home > Administer Workforce > Administer Workforce Division > Use > Personal Data. A 'New Window' link is also present. The main content area has tabs for Name History, Address History, Personal History, Identity/Diversity, Citizenship (selected), and LBNL Personal Data. The Citizenship section displays a table with one row showing the country as 'USA' (United States) and the U.S. Citizenship Status as 'U.S. Citizenship'. The table has a 'View All' link and a 'First 1 of 1 Last' indicator. At the bottom of the page, there are several buttons: Save, Return to Search, Previous tab, Next tab, Refresh, Update/Display, Include History, and Connect History. A footer bar contains links to Name History, Address History, Personal History, Identity/Diversity, Citizenship, LBNL Personal Data, and LBNL Directory.

Req	Field Name	Type	Description
	Country	LU	IRSO will maintain this data as necessary.
	U.S. Citizenship	VL	Status for citizenship as it relates to USA.

LBNL Personal Data

This page is not effective dated, to update simply edit the field and save the new data.

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[Name History](#) [Address History](#) [Personal History](#) [Identity/Diversity](#) **LBNL Personal Data** [LBNL Directory](#)

Samuels, George G Employee **EmplID:** 008051

☐ **UC Student** ☒ **Release Address?**

Referral Comment:

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[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | **[LBNL Personal Data](#)** | [LBNL Directory](#)

Req	Field Name	Type	Description
	UC Student	CB	Check if employee is at any UC campus.
	Release Address?	CB	Check if employee authorizes home address be released for official business, i.e. unions. See employment application.
	Referral of Comment	—	Not used

* Required Field

LBNL Directory

This page is not effective dated, to update simply edit the field and save the new data.

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Name History Address History Personal History Identity/Diversity LBNL Personal Data LBNL Directory

Samuels, George G EmpID: 008051

Email ID: Phone Book Name: Samuels, George G (Sam)

Mail Drop ID: 937-0600

☒ Published in Phonebook Nickname: Sam

☐ Hidden from Web directory Nickname code: Append

Work Locations and Phones View All First 1 of 1 Last

'Location #: 1 'Building: 937 Berkeley Tower 'Room: 0642 Cubicle Office

Phones View All First 1 of 1 Last

1 Work Phone 1 510/486-5044

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct His

[Name History](#) | [Address History](#) | [Personal History](#) | [Identity/Diversity](#) | [LBNL Personal Data](#) | [LBNL Directory](#)

Req	Field Name	Type	Description
	Email ID	—	Autofilled/Updated by LBNL Postmaster, view only
*	Mail Drop ID	LU	Enter LBNL Mailstop, Use lookup.
	Phone Book Name	—	Display of name that will be listed in web directory. Save record to view changes.
	Published in Phonebook	CB	Default: checked – record will display in printed phone book, contact tsc@lbl.gov for update. View only
	Hidden from Web Directory	CB	Default: unchecked – record will display on web directory, contact tsc@lbl.gov for update. View only
	Nickname	—	Enter alternate first name
	Nickname Code	VL	Enter desired action for nickname data. Append to add in parentheses to current name, replace to replace first name field value, blank for no display changes.
*	Location #	—	First office or lab location must be 1. Insert outer record row to have multiple office/lab locations.
*	Building	LU	Enter Bldg. number. Use lookup. Data checked.
*	Room	LU	Enter room number. Use lookup. Data checked.
*	Phones (type)	LU	First phone type must be 1- Work Phone 1, insert new row for Fax, Work Phone 2, Cell, etc.
*	Work Phone	-	Enter number, if LBNL extension number only enter the 4-digit extension, let system assign area code and prefix. If other number enter in phone format. Example:(415) 456-4657

* Required Field

Job Data

Work Location

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[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Payroll](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#)

Samuels, George G Employee **EmplID:** 008051

Work Location First 1 of 2 Last

Employee Status: Active **Date Created:** 10/11/2002 + -
***Effective Date:** 10/11/2002 📅 **Effective Sequence:** 1
Action / Reason: Transfer ▼ **REO** 🔍 Reorganization Current

***Regulatory Region:** USA 🔍 United States
Company: LBL Lawrence Berkeley Laboratory
***Business Unit:** STDBU 🔍 LBNL Business Unit
Department: HR Human Resources **Department Entry Date:** 10/11/2002 📅
Location: 0001 🔍 Berkeley
Supervisor ID: 🔍
Establishment ID: 01

[Job Data](#) | [Employment Data](#) | [Benefits Program Participation](#)

💾 Save 🔍 Return to Search 📄 Previous tab 📄 Next tab 🔄 Update/Display 📜 Include History 🗑️ Correct History

[Work Location](#) | [Job Information](#) | [LBNL Miscellaneous](#) | [Payroll](#) | [Compensation](#) | [GSRA Data](#) | [Dept Info](#)

Req	Field Name	Type	Description
	Employee Status	—	Displays of active status of the data row
	Date Created	—	Displays the date when the row was entered (action date)
*	Effective Date	DT	Enter the date this data row is effective
*	Effective Sequence	—	Enter sequence of actions if multiple actions on same effdt
* / *	Action/Reason	VL	Enter Primary action code and Specific reason for the action, select from value lists.
	Regulatory Region	LU	Defaults to USA, do not change
	Company	—	Defaults to LBL, do not change
	Business Unit	LU	Defaults to STDBU, do not change
	Department	—	Leave blank, will auto fill from Dept Info tab
	Department Entry Date	DT	Leave blank, will auto fill from last update action in Dept Info
	Location	LU	Defaults to 0001, do not change – consult with payroll mgr. for changes
	Supervisor ID	LU	Enter supervisor ID, name will display.
	Establishment ID	—	Defaults to 01, do not change

* **Required Field**

Job Information

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Samuels, George G Employee EmplID: 008051

Job Information First 1 of 2 Last

Effective Date: 10/11/2002 Effective Sequence: 1

Action / Reason: Transfer Reorganization Current

*Job Code: E10.2 Mechanical Engineer 2 Entry Date: 10/11/2002 Planned Exit: ☐ End Job Automatically

Supervisor Level: ☐ Full/Part: Full-Time

*Regular/Temporary: Regular *Officer Code: Not Applicable

Empl Class: Career Shift Rate: /

*Regular Shift: N/A FTE: 1.00

Standard Hours: 40.00

Work Period: W Weekly

▼ USA

*FLSA Status: Exempt

*EEO Class: None

Work Day Hours:

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Req	Field Name	Type	Description
*	Job Code	LU	Enter Job Code. Use lookup. Data checked.
	Entry Date	DT	Leave blank, will auto fill with date when job code changes
	Planned Exit	DT	Leave blank, not used.
	End Job Automatically	CB	Leave blank, not used.
	Supervisor Level	LU	Leave blank, not used.
	Regular/Temporary	VL	Auto fills from Empl Class entry. (Regular: positions with no end date, Temporary: positions with end date.)
*	Full/Part	VL	Enter value, select from value list
*	Empl Class	VL	Enter value, select from value list
-	Officer Code	VL	Defaults to Not Applicable. Enter value if necessary, select from value list. (head level appointments only, requires LD approval)
	Regular Shift	VL	Defaults to N/A, not used in HRIS. Shift code is in LETS.
	Shift Rate	-	Defaults blank, do not change.
*	Standard Hours	-	Enter hours worked per week. 40=100%
	FTE	-	Calculates from standard hours (1.0 = 100% or 40 hrs/wk)
	Work Period	LU	Defaults to W – weekly, do not change, LBNL hours are weekly.
	FLSA Status	VL	Update as necessary
	EEO Class	VL	Auto Fills from Job Code
	Work Day Hours	-	Leave Blank. Not used.

*** Required Field - Required only if applicable**

LBNL Miscellaneous

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Shroff, Hari Employee **EmplID:** 008051

LBNL Job Data First 1 of 2 Last

Employee Status: Active **Date Created:** 09/26/2002 + -
Effective Date: 09/26/2002 **Effective Sequence:** 1
Action / Reason: Status Change SUP Supervisor/Host Change

Union Code: Non Represented **FWO Type:** STD WW
HEERA Status: ☐ Confidential Employee? **Job Requisition #:**
Comment:

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Req	Field Name	Type	Description
*	Union Code	VL	Auto fills from Job Code entry, do not edit, requires LER approval.
-	HEERA Status	VL	Defaults to "Non-Superv", edit as necessary. Requires LER approval since change will change union code.
-	Confidential Employee	CB	Check box if appropriate, edit as necessary. Requires LER approval since change will change union code.
-	FWO Type	LU	Defaults to Standard WorkWeek of 5 - 8hr days M – F. Update is done by Payroll only.
-	Job Requisition	LU	Not used in Version 8
	Comment	—	Enter special comments regarding this job data row.

* **Required Field** - **Required only if applicable**

Payroll

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[Work Location](#) [Job Information](#) [LBNL Miscellaneous](#) **Payroll** [Compensation](#) [GSRA Data](#) [Dept Info](#)

Samuels, George G Employee **EmplID:** 008051

Payroll Info First 1 of 2 Last

Effective Date: 10/11/2002 **Effective Sequence:** 1

Action / Reason: Transfer Reorganization Current

'Payroll System: Payroll for North America

Payroll for North America

Pay Group: MON Monthly **Holiday Schedule:** LBL LBL HOLIDAY

Employee Type: S Salaried **FICA Status:** Subject

Tax Location Code: 0001 Berkeley

GL Pay Type:

Project ID:

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Req.	Field Name	Type	Description
	Payroll System	VL	Always should be Payroll for North America
	Pay Group	LU	Defaults from Job Code, do not edit.
	Holiday Schedule	LU	Defaults to LBL, do not edit
	Employee Type	LU	Defaults from Job Code, do not edit.
	Tax Location Code	LU	Defaults to 00001 – Berkeley, Requires Payroll Mgr. Approval to edit.
	FICA Status	VL	Defaults to Subject and is edited during the Applicant Hire process or by Payroll Dept.
	GL Pay Type	—	Not Used
	Project ID	LU	Not Used

Compensation

This page is effective dated and is entered only during the Applicant Hire process or by the payroll group. Send corrections to payroll@lbi.gov or update by Personnel Action Form (PAF) to the payroll department.

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Work Location Job Information LBNL Miscellaneous Payroll Compensation GSRA Data Dept Info

Samuels, George G Employee EmplID: 008051

Compensation First 1 of 2 Last

Effective Date: 10/11/2002 **Effective Sequence:** 1

Action / Reason: Transfer Reorganization Current

Compensation Rate: 6,000.000000 **Frequency:** M Monthly

Comparative Information

Change Amount: 0.000000 USD Monthly **Compa-Ratio:** 0.99

Change Percent: 0.000

Pay Rates

Annual	72,000.000000	USD	Daily	276.923077	USD
Monthly	6,000.000000	USD	Hourly	34.615385	USD
Full Time Monthly Rate:	6,000.00				

Default Pay Components [Contract Change Prorate Option](#)

Pay Components First 1 of 1 Last

Amounts Changes Conversion

Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Percent
1 NAANNL	0	Details	6,000.000000	USD	M	

Calculate Compensation

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Req	Field Name	Type	Description
	Compensation Rate	—	Auto fills from Pay Component area. “Calculate Compensation” button must be pressed to populate this field.
	Frequency	LU	Auto fills from Job Code, may be edited with approval only. Use lookup.
	Comparative Information	-	Displays amount and percent changes in Compensation Rate for this row compared to the one before it.
	Pay Rates	-	Displays calculated Hourly, Daily, Monthly, and Annual rates for the Compensation Rate.
*	Rate Code	LU	Enter for Hourly (Hourly) or Flat Rate (Monthly), used for calculating the compensation. Use lookup.
	Seq	—	Not Used, we only have one rate code
	Details	link	Not Used
*	Comp Rate	—	Enter Comp Rate in, must press “Calculate Comp” button to populate Comp Rate field.
	Currency	LU	Default is USA, do not change
	Frequency	LU	Auto fills from Rate Code.
	Percent	-	Display not populated

* **Required Field**

GSRA Data

This page is effective dated and is entered only during the Applicant Hire process or by the payroll group. Send corrections to payroll@lbl.gov or update by Personnel Action Form (PAF) to the payroll department.

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Samuels, George G Employee EmplID: 008051

GSRA Job Data View All First 1 of 2 Last

Employee Status: Active + -

***Effective Date:** 10/11/2002 Current **Effective Sequence:** 1

Action / Reason: Reorganization **ACTN DATE:** 10/11/2002

***Job Code:** E10.2 Mechanical Engineer 2

% Time: **Std Hrs/Wk:** 40.00

Comp Rate: 6000.000000

Project ID:

Student ID:

Student Type: ☐

GSRA Units: ☐ UC Safe Harbor Override

Hourly Rate: 34.615385
Monthly Rate: 6000.000
FT Mon Rt: 6000.00
Annual Rate: 72000.000

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Req	Field Name	Type	Description
	Job Code	LU	Auto fills from Job Information, do not change here. Send PAF to payroll.
	% Time	-	Auto fills from Job Information
	Std Hrs/Wk	-	Auto fills from Job Information
	Comp Rate	-	Auto fills from Compensation
	Project ID	LU	Enter Project ID to charge labor hours, look up takes time, type it yourself whenever possible :0)
	Student ID	-	Blank, not used at this time
	Student Type	LU	Blank, not used at this time
	GSRA Units	-	Blank, not used at this time
	UC Safe Harbor Override	CB	Blank, not used at this time
	Hourly Rate	-	Display of hourly rate calculation based on comprate not full time rate.
	Monthly Rate	-	Display of monthly rate calculation based on comprate not full time rate.
	FT Mon Rt	-	Display of Full Time monthly rate calculation based on comprate and standard hours of 40hrs/wk (Full time, 100%)
	Annual Rate	-	Display of annual rate calculation based on comprate, not full time rate.

* Required Field

Dept Info

This page is effective dated and is entered only during the Applicant Hire process, using the “Division Orgcode Data” component or by the payroll group. Send corrections to payroll@lbl.gov or update by Personnel Action Form (PAF) to the payroll department. Changes to Level 1 Orgcode are done by PAF, changes within a same Level 1 are done by HR Center staff.

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Samuels, George G Employee EmplID: 008051

Job Data [View All](#) First 1 of 2 Last

Effective Date: 10/11/2002 **Effective Sequence:** 1

Action / Reason: Transfer Reorganization

Orgcode Info [View All](#) First 1 of 1 Last

Level 0: HR Human Resources

Level 1: Human Resources

Level 2: Compensation & Benefits

Level 3:

Level 4:

☒ **Primary Org Code**

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Req	Field Name	Type	Description
	Level 0	—	Auto fills from selected Level 1, used for reporting when multiple divisions want to be grouped in one organization.
*	Level 1	LU	Enter Division/Department Code. Use lookup. Data checked.
	Level 2	LU	Enter Department/Group code. Use lookup. Data checked.
	Level 3	LU	Enter Group/Unit code. Use lookup. Data checked.
	Level 4	LU	Enter Level 4 code. Use lookup. Data checked.
	Primary Org Code	CB	Check for primary Level 1 only. One and only one orgcode row may be checked for a given job date row.

* Required Field

Insert multiple orgcode rows as needed. Max is usually only two, without repeating Level 1.

Employment

Employment Data

This page is not effective dated with a customized effective dated scroll area. To update the non effective dated fields simply edit the field and save the new data. To update the effective dated area you must insert a row, edit the data to be correct, and save. Send correction to payroll@lbl.gov.

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Employment Data
Employment Dta2
LBNL Guest

Shroff, Hari
Employee
EmplID: 008051

Hire Date: 09/26/2002
Rehire Dt:
Termination Date:

Company Seniority Date: 09/26/2002
Last Date Worked:

Service Date / Months / Days: 09/26/2002 7 / 10
Expected Return Dt:

Professional Exp Date:
Probation Date:

Date Last Increase: 09/26/2002
Empl Rehire Date:

Employee Hire Date: 09/24/2002
Adj BS Yr:

Appt End Date: 09/23/2003

View All First 1 of 1 Last

Effective Date: 09/26/2002

Business Title:

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Save
Return to Search
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Include History
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Req.	Field Name	Type	Description
	Hire Date	–	Display only, Auto fills – date of ‘hire’ action in PS HRIS, all Empl_Class
	Rehire Date	–	Display only, Auto fills – date of last rehire action, all Empl_Class
	Termination Date	–	Display only, Auto fills – date of last termination action. Disappears when record is rehired.
	Company Seniority Date	DT	Auto fills on hire action, Edit manually for rehire action. – date of LBNL seniority. Used for RIF. Includes UC, LLNL, LANL service if there is not break in service. Not included: 50% time, LWOP >30 days, and Variable time. Periods with between 50% and 100% time are prorated. Complete worksheet to calculate.
	Last Date Worked	DT	Terminated records only. Enter date prior to effective date of termination action
	Service Date/Months/Days	DT	Auto fills on hire action, Edit manually for rehire action – date of UC service. Used for vacation accrual and service pin awards. Includes prior UC, LLNL, LANL or CA state employment. Not included: 50% time, LWOP >30 days, and Variable time. Complete worksheet to calculate.

* **Required Field**

Employment Data (continued)

Req.	Field Name	Type	Description
	Expected Return Dt	DT	Entered for persons on leave only. First date expected to be back at work.
	Professional Exp Date	DT	Not Used
	Probation Date	DT	Enter date for end of probation period for hire and rehire actions.
	Date Last Increase	DT	Auto fills – date of last comprate change.
	Employee Hire Date	DT	Auto fills – date of first hire as an employee
	Empl Rehire date	DT	Auto fills – date of last rehire as an employee
	Adj BS Yr	DT	Enter Adjusted BS Year. Complete worksheet to calculate.
*	Appt End Date	DT	Enter if applicable. Date when appointment expires.
*	Effective Date	DT	Enter date Business Title changes, hire date or other
	Business Title	–	Optional, Auto fills Job Code Title from Applicant Hire process - Enter text if Business Title is different from Job Code Title.

* Required Field

Employment Data 2

This page is not effective dated, to update simply edit the field and save the new data.

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Employment Data | Employment Dta2 | **LBNL Guest**

Samuels, George G Employee EmplID: 008051

☐ UC Executive Program? ☐ Accepted UCRP Waiver?
☐ Principal Investigator Status Waiver Date: _____
☐ Designated Official
☐ Prior UC Service?
Faculty Stipend: _____ PIN SignDt: 10/11/2002 [BT]
Student Program: _____ Exp Grad Date: _____ [BT]
Survey Code: _____ Service Award Date: _____ [BT]
Service Award Type: [?]

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[Employment Data](#) | [Employment Dta2](#) | [LBNL Guest](#)

Req	Field Name	Type	Description
	UC Executive Program	CB	Check if applicable
	Accepted UCRP Waiver	CB	Check if applicable
	Principal Investigator Status	CB	Check if applicable
—	Designated Official	CB	Check if applicable, Send letter on hire/rehire or termination
	Waiver Date	—	Enter Date if applicable for rehire of retiree
	Prior UC Service	CB	Check if applicable, edit Seniority or Service date
	Faculty Stipend	—	Enter if applicable
*	PIN Sign DT	DT	Enter data of Hire – activates UCOP web pin date
	Student Program	VL	Enter if applicable, select from value list
	Exp Grand Date	DT	Enter Date if applicable
	Survey Code	VL	Not used
	Service Award Type	LU	Enter last Service Pin type received. Use look up.
	Service Award Date	DT	Enter date of receipt of corresponding service pin type.

*** Required Field -Required if applicable**

LBNL Guest

This page is not effective dated, to update simply edit the field and save the new data.

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Employment Data | Employment Dta2 | LBNL Guest

Samuels, George G Employee EmplID: 008051

Guest Class: Phone:

Preparer:

Guest Email:

Reason of Visit:

From Date: To Date: Facility Used:

Income Support View All First 1 of 1 Last

Institution: + -

☐ Employee of Institution? Department:

Supplemental Funding Support View All First 1 of 1 Last

Inst/Fund: Type: + -

Amount: Start Date: End Dt:

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Save
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Req	Field Name	Type	Description
*	Guest Class	LU	Enter general guest class. Use look up
*	Preparer	LU	Enter Employee ID for prepare of guest documents
	Phone	_	Auto fills work phone 1 for preparer
	Guest Email	_	Enter Guest private email address, not lbl.gov
*	Reason for Visit	_	Enter brief description of duties while here at LBNL
*	From Date	DT	Enter first date of appointment, same as hire or rehire effdt
*	To Date	DT	Enter last date of appointment, same termination effdt
	Facility Used	LU	Enter if applicable, LBNL user facilities listed. Use lookup.
*	Institution	LU	Enter Sponsoring Institution. Use look up.
*	Employee if Institution	CB	Check if guest is employee of Sponsoring Institution
	Department	LU	Enter dept at Sponsoring Institution - Optional
	Inst/Fund	LU	Optional for tacking other funding, select funding institution
	Type	LU	Optional – enter type of funding. Use look up
	Amount	_	Optional – enter amount in \$ monthly (total \$/mo)
	Start Date	DT	Optional – enter start month for funding
	End Dt	DT	Optional – enter end month for funding

* **Required Field**

Benefit Program Participation

This page is effective dated and is entered only during the Applicant Hire process or by the payroll group. Send corrections to payroll@lbl.gov or update by Personnel Action Form (PAF) to the payroll department.

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > [Job Data](#) [New!](#)

Benefit Program Participation

Samuels, George G Employee EmplID: 008051

Deductions Taken: Deduction Deduction Subset ID:

Benefit Status First 1 of 2 Last

Effective Date: 10/11/2002 **Effective Sequence:** 1

Action / Reason: Transfer Reorganization Current

'Benefits System: Base Benefits **Benefits Employee Status:** Active

Annual Benefits Base Rate: 72000.000 USD

Benefit Program Participation View All First 1 of 1 Last

'Effective Date: 10/11/2002 'Benefit Program: TIP Full Benefit Program w TIP Currency Code: USD

[Job Data](#) [Employment Data](#) Benefits Program Participation

[Save](#) [Return to Search](#) [Update/Display](#) [Include History](#) [Correct History](#)

Req.	Field Name	Type	Description
	Benefits System	VL	Display only, default is Base Benefits
	Benefits Employee Status	—	Display only, active status of the job row
	Annual Benefits Base Rate	—	Calculated on at time of hire or rehire. Recalculated annually.
*	Effective Date	DT	Enter Date of Hire or rehire action
*	Benefit Program	LU	Enter appropriate Program Code, Use lookup and select according to Benefit Plan Matrix.
	Currency Code	—	Defaults to US Dollars.

* **Required Field**

Historical Employees

Use this page to establish whether the person has an existing record in HRIS or Historical Only record.

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Historical Employees**

Historical Employees

Historical Employees

008051

Samuels, George G

SSN: 572-58-7458

Status: A Active

Empl Class: N Career

Job Code: E10.2

Hire Date: 10/11/2002

Rehire Date:

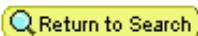
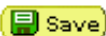
Term Date:

Date of Birth: 07/10/1958

Address

Street: 1212 Test

City/State/Zip: Berkeley CA 94720



This page displays the most current row of data in the requested employee record. If there is a record in this page and the record cannot be called up using the Administer Workforce (GBL) access then the record is what we call 'Historical'.

HR Center Staff who do not have the Administer Workforce (GBL) access should use Administer Workforce Division access to determine if you have access to the record. Contact HRIS@lbl.gov for clarification of records' status. To rehire an existing employee as a Guest fax the PGI form to Payroll@lbl.gov.

A Historical Only record means that the data was not loaded in HRIS and a new "Hire" action must be done in order to establish a new record for the person.

If the record exists in both the Historical Employees search page and in the Administer Workforce (GBL) access; then the record is currently in HRIS and the appropriate rehire or other action should be done.

Emergency Contact

Contact Address/Phone

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Emergency Contact**

Contact Address/Phone **Other Phone Numbers**

Samuels, George G Employee EmpID: 008051

Emergency Contact View All First 1 of 1 Last

*Contact Name: Samuels, Sally + -

*Relationship to Employee: Sister ☒ Primary Contact

☒ Same Address as Employee Address Type: HOME

☒ Same Phone as Employee Phone Type:

Employee's Current Address

Country: USA United States

Address 1: 1212 Test

Address 2:

City: Berkeley

County: Postal: 94720

State: CA California

Employee's Phone

Phone:

Save Return to Search

[Contact Address/Phone](#) | [Other Phone Numbers](#)

Req.	Field Name	Type	Description
*	Contact Name	—	Enter Contact Name in PS format (Last,First M)
*	Relationship to Employee	VL	Enter relationship to employee, Use value list
*	Primary Contact	CB	Check for primary contact. Only one may be 'primary'.
	Same Address as Employee	CB	Check if address is same as EE, select with type to autofill
	Same Phone as Employee	CB	Check if phone is same as EE, select phone type to autofill
*	Country	LU	Enter country of address, this will format the address fields
*	Address	—	Enter street location and appt # if applicable
*	City	—	Enter city
*	Postal	—	Enter Postal Zip code
*	State	LU	Enter State
*	Phone	—	Enter phone number, include area code

* Required fields

Other Phone Numbers

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Emergency Contact**

[Contact Address/Phone](#) **Other Phone Numbers**

Samuels, George G

Employee

EmplID: 008051

Emergency Contact

[View All](#) [First](#) 1 of 1

Contact Name: Samuels, Sally

Relationship to Employee: Sister

☒ **Primary Contact**

Other Phone Numbers for Emergency Contact


[View All](#) [First](#) 1 of 1

Phone Type

Business

Phone

 **Save**

 **Return to Search**

[Contact Address/Phone](#) | [Other Phone Numbers](#)

Req.	Field Name	Type	Description
*	Phone Type	VL	Enter type of other phone, use value list
*	Phone	—	Enter phone number, include area code

* Required fields

Identification Data

The International Researchers and Scholars Office (IRSO) updates these pages. Contact IRSO for update or correction of data.

Citizenship/Passport

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Identification Data** [New!](#)

Citizenship/Passport [Visa/Permit Data](#) [Visa Comments](#)

Samuels, George G Employee EmpID: 008051

Citizenship View All First 1 of 1 Last

'Country: USA United States U.S. Citizenship Status: Citizen EmpID: 008051 Dependent ID:

Passport Information View All First 1 of 1 Last

'Passport Number: Issue Date: Long Term End Dt: Country: USA United States State: City: Authority: Comment:

Visa Entries View All First 1 of 1 Last

Entries: Visa Expiry Date:

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Citizenship/Passport](#) | [Visa/Permit Data](#) | [Visa Comments](#)

Req.	Field Name	Type	Description
	Country	LU	Enter Country if citizenship, use lookup
*	U.S. Citizenship Status	VL	Enter citizenship in relation to US, use value list
	Passport Number	_	Enter passport number
	Issue Date	DT	Enter date passport issued
	Long Term End Dt	DT	Enter expiration date of passport
	Country	LU	Enter Country code that issued passport, use lookup
	City	-	Enter City that issued passport
	Authority	-	Not used
	Comment	-	Enter comment as necessary
	Entries	LU	Enter US visa approved number of entries
	Visa Expiry Date	DT	Enter Visa expiration date

* Required for all Employees and Guests

Visa/Permit Data and Visa Comments

This page is used by IRSO for visa tracking and information. Contact IRSO if you have questions.

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Identification Data** [New!](#)

[Citizenship/Passport](#) [Visa/Permit Data](#) [Visa Comments](#)

Samuels, George G ID: 008051

Empl Class: Career Status: Active Appt EndDt:

Visa/Permit Data View All First 1 of 1 Last

*Effective Date: 10/16/2002 Effective Sequence: 0

*Country: USA USA Renew By Date:

Immigration Classification

*Visa/Permit Type: Visa/Permit Number:

Immigration Classification Status

*Visa/Permit Status: Applied Expiration Date: ☐ Program Transfer?

Visa Category: Sponsor: Training:

☐ Two Year Home Residency Req?

Supporting Documents Needed View All First 1 of 1 Last

*Supporting Document ID: Reqst Date Date Recvd Start Date End Date

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Citizenship/Passport](#) | [Visa/Permit Data](#) | [Visa Comments](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce Division](#) > [Use](#) > **Identification Data** [New!](#)

[Citizenship/Passport](#) [Visa/Permit Data](#) [Visa Comments](#)

Samuels, George G ID: 008051

Empl Class: N Empl Status: A Appt EndDt:

Comment View All First 1 of 1 Last

Effective Date: 10/16/2002 Effective Sequence: Visa/Permit Type:


Comment:

[Save](#) [Return to Search](#) [Previous tab](#) [Next tab](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Citizenship/Passport](#) | [Visa/Permit Data](#) | [Visa Comments](#)

Out of Class Rate

Use this page to view out of class assignments for bi-weekly paid employees. Updated by payroll department


Home Help Sign Out

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > **Out Of Class Rate** [New Window](#)

Out of Class Assignment Rate

EmplID: 000197 Barry, Michael J
SetID: LBL01
Job Code: 405.1 Budget Analyst I

Scroll Area
View All
First
1 of 1
Last

Effective Date: 07/03/2002 ☐ Active ☒ Inactive
 OCA Hourly Premium: 1.300000
 + -


Save Return to Search
Add Update/Display Include History Correct History

Req.	Field Name	Type	Description
*	Job Code	-	Displays the Out of Class Job code
*	Effective Date	DT	Date the OOC action status begins
*	Active /Inactive radio buttons	Radio	Status of row
*	OCA Hourly Premium	-	Pay differential for the OOC

* Required fields

Orgcode Data

Use this page to update OrgCode within your Level 1. To update insert a new row using the outer plus button (+). To change Level 1 submit a PAF to the Payroll Dept. Action in this page will insert a Job Data row.



[Home](#)
[Help](#)
[Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > **Orgcode Data**
[New Window](#)

Dept Info

Barry, Michael J
Employee
EmplID: 000197

Job Data

View All
First 1 of 1 Last

Effective Date: 08/05/1997
Effective Sequence: 0
Job Indicator: Primary Job

Action / Reason: Data Change

Orgcode Info

View All
First 1 of 1 Last

Level 0:

Level 1:

Level 2:

Level 3:

Level 4:

☒ Primary Org Code

Save

Return to Search

Update/Display


Include History

Req.	Field Name	Type	Description
	Level 0	-	AutoFills from Level 1
*	Level 1	LU	Enter Level 1, use lookup
	Level 2	LU	Enter if needed, use lookup
	Level 3	LU	Enter if needed, use lookup
	Level 4	LU	Enter if needed, use lookup
	Primary Org Code	CB	Check for Primary Organization, only one Orgcode row can be primary. Other rows are 'matrix' organizations.

* Required fields

Change HEERA

Use this page to update HEERA status field on the Job Data – LBNL Miscellaneous page. To update insert a new row using the outer plus button (+). Action in this page will insert a Job Data row.



[Home](#)
[Help](#)
[Sign Out](#)

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > **Change HEERA**
[New Window](#)

Change HEERA

Barry, Michael J
Employee
EmpID: 000197

Scroll Area

View All
First
1 of 1
Last

Employee Status: Active

☐ Position Management Record

Effective Date: 08/05/1997
Current

Effective Sequence: 0

Action / Reason: Data Chg
ORG

Action Date: 07/23/1997

HEERA Status: Non-Superv
Non-Supervisor

Save
Return to Search

Update/Display
Include History
Correct History

Req.	Field Name	Type	Description
	Employee Status	—	Displays current status of the record
*	Effective Date	DT	Enter the effective date of the new HEERA status
	Effective Sequence	—	Enter seq + 1 if effective date is same as existing row
	Action/Reason	—	Defaults to “Status Change/HEERA” on this page
	Action Date	—	Displays date of user action
*	HEERA Status	VL	Edit new HEERA Status, use value list

* Required fields

Change Supervisor ID

Use this page to update a Supervisor ID on the Job Data – Work Location page. To update insert a new row using the outer plus button (+). Action in this page will insert a new Job Data row.

Home > Administer Workforce > Administer Workforce Division > Use > Change Supervisor ID [New Window](#)

Supervisor ID: Shroff, Hari Employee: EmpID: 008051

Job Data View All First 1 of 2 Last

Effective Date: 09/26/2002 Effective Sequence: 1

Action / Reason: Status Change Supervisor/Host Change

Supervisor ID: 001266 Liphardt, Jan T

Save Return to Search

Req.	Field Name	Type	Description
*	Effective Date	DT	Enter the effective date of the new Supervisor IS
	Effective Sequence	—	Enter seq + 1 if effective date is same as existing row
	Action/Reason	—	Defaults to “Status Change/Supervisor/Host Change” on this page
*	Supervisor ID	LU	Edit new Supervisor ID, use look up as necessary

* Required fields

Reports and Queries

Overview

HRIS 8.3 runs both reports and queries to web based applications. The output may be printed or saved to the user's desktop according to the output selected at the time the report or query is run.

SQR and Crystal – There are two primary Report types, SQR and Crystal. Both report types 'print' the output to Adobe Acrobat. Hardcopies can be reviewed and printed from there.

Queries – Always output to an html version of Excel. Users should use the .CSV format to save the query output to their desktop. This file should be opened with Excel – the data will automatically parse the data into the worksheet. Note: Data formats for numbers (including emplid), date, time, and dollar values will need to be formatted. This version of query-excel does not impose standard formatting on the exported data fields. Tips on formatting output in Excel are included in this section.

How to Run a Report

Run Control ID

When you want to run a report or process, you need to tell the system when and where you want it to print. For most reports or processes, you also need to set parameters that determine the content of the report, such as the business unit or time period on which to report.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a report, you create (and save) a run control with those settings. The next time you run the report, you select the run control, and the system fills in the settings.

A run control is created in "Add" mode and is saved when either the save button is pressed or when the selected report runs successfully. Once you create a run control ID you should always use the same one.

How to Run an SQR Report

1. **Select the Report** you wish to run (update display mode)
2. Enter a **Run Control ID**
3. Enter **Parameters** or skip to step 4
4. Click the **"Run" button**
5. Select Server Name: **PSUNX**
6. Select Type: **Web**
7. Select Format: **PDF**
8. Click **OK**, the report will "process"
9. To view and print the report, Click the **Process Monitor link**
10. Click the **"Refresh" button** until the Run Status is **"Success"**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click **the *.pdf file link (the name will consist of the file name and run instance #)**
14. **View** and **print** report from Acrobat .pdf file

How to Run a Crystal Report

1. **Select the Report** you wish to run (update display mode)
2. Enter a **Run Control ID**
3. Enter **Parameters** or skip to step 4
4. Click the **“Run” button**
5. Select Server Name: **PSNT**
6. Select Type: **Web**
7. Select Format: **PDF**
8. Click **OK**, the report will “process”
9. To view and print the report, Click the **Process Monitor link**
10. Click the **“Refresh” button** until the Run Status is **“Success”**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click **the *.pdf file link (the name will consist of the file name and run instance #)**
14. **View** and **print** report from Acrobat .pdf file

How to Run a Public Query

Accessing the Query Manager

Roadmap

[Home](#) > [PeopleTools](#) > [Query Manager](#) > [Use](#) > Query Manager

How to Run an Existing Query without ‘opening the query’

1. **Search for the Query** you wish to run
 - Enter a partial query title and click the Search button (use wildcard, see Appendix A)
 - Leave search criteria blank to view all available Queries
2. Click **Search button** to list available Queries
3. Click the **Run link** on the row for the title you wish to execute, a separate IE window will open to display the prompts and results.
4. Enter **Prompts if applicable** and Click the View Results button. If the query has no prompts your query results will be displayed.
5. Results will display in IE html page. Data can be viewed or downloaded to your desktop.
6. To down load to Excel –**Use the “CSV Text File” link.** Do Not use the “Excel Spreadsheet” link.
 - *CSV Text File link* creates a simple text file that is automatically opened in Excel and easily formatted
 - *Excel Spreadsheet link* creates an excel file with very unfriendly formatting. Not recommended.
7. Save the CSV file to your desktop, rename if desired.
8. Double click the CSV file on your desktop and the file will open in Excel. Format the file as needed. See Query Excel formatting tips listed a below.
9. To exit the query, Close the Query – Results IE window.
10. To run a new query, Activate the Query Manager IE window, it should still be open but minimized.

NOTE: A query must be “SAVED” before it will run. If you edit any part of a query you must first save it before running.

Tips on formatting your Query Output

- 1) When you first open the CSV file, always format the spreadsheet ad save.
 - a) Select all cells in the spreadsheet using the top left cell. Hot Key: Ctrl-A
 - b) AutoFit the column width – Format, Column, AutoFit Selection. Hot Key: Alt-O,C,A
 - c) Left Justify all columns – click the Align Left tool bar button
 - d) Change the .CSV format of the spreadsheet - Save your CSV file, edit the “Save as type” to be Excel Workbook, Click OK.
- 2) Use Excel’s Format, Cells menu option to standardize field by column. Fields that we suggest formatting are: Numbers (including emplid), Dates, and Time.

Appendix A

HRIS and PeopleSoft Terminology

Search Pages

Basic Search page:

The basic search page offers just one or two fields by which you may perform your search. However, you may designate which key field you would like to search by from the **Search By** drop-down list box.

Advanced Search page:

The advanced search page generally offers several keys by which you may search for your record. It allows you to narrow down your search by entering in more than one type of criteria.



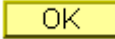
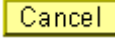
Using Wildcards

PeopleSoft applications support three wildcard features when searching for data. These wildcards can be helpful in finding the exact information you want to process. The following are the standard wildcard features.

% (percent sign)	Match one or more characters.
_ (underscore)	Match any single character.
\ (back slash)	Escape character—don't treat the next character as a wildcard.

For example, you can type a number string of possible employee names along with the % sign, such as S%,Frank and the system returns a list of those employees whose names match that criterion of last name starting with "S" and first name "Frank"









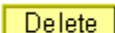






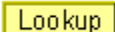
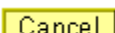
Buttons for Processing Transactions

Button	Name	Function
	Apply	Usually found on a page that you opened by clicking a prompt button. Enables you to apply the data input without returning you to the main page in case you want to perform additional searches.
	Run	Opens the Process Scheduler Request dialog box where you can set up your process control parameters for the current process.
	Okay	Accepts the data input made on an auxiliary page and returns you to the main page.
	Cancel	Clears the page and any data that you may have entered or changed without saving. When you click Cancel, the system doesn't warn you to save changes. Use Cancel if you entered data incorrectly and want to begin again.

More keyboard and link short cut continued on next page...

Short Cut or Hot Keys.

Hot keys perform an immediate action. When you press any of the key combinations below, the designated action occurs. You'll notice that several hot keys perform different functions depending on the page you are in, such as a transaction page or a search page.

Hot Key	Button or Link	Action
Alt+5		Opens lookup page.
		Opens the calendar prompt.
Alt+6	  	Opens the pop-up window on a page.
Alt+7	  	Inserts one or more rows in a grid or scroll area.
Alt+8	 	Deletes row in a grid or scroll area.
Alt+0		When in Expert Entry mode, validates data entered in page.
Alt+ .		Next in grid, scroll, or search page results list.
Alt+ ,		Previous in grid, scroll area, or search page results list.
Alt+ \	<u>Add a New Value</u>	Toggles between "Add a New Value" and "Find an Existing Value" in a Search page.
	<u>Find an Existing Value</u>	
Alt+ /	<u>Find</u>	Find data in grid or scroll area.
Alt+ '	<u>View All</u>	View all rows of data in grid, scroll area or search page results list.
Ctrl+ K	--	When in a search page or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.
Enter		Activates the Okay button where appropriate.
		On a Search page, activates the search button.
		On a Lookup page, activates Lookup button.
Esc		Activates the cancel button where appropriate.

Appendix B

The Components and Tabs:

Component	Page (Tab)	Description	How Updated
Personal Data	Name History	Effective dated, contains first, middle, last name	Insert row
	Address History	Effective dated, contains home and mail address, home phone.	Insert row
	Personal Information	Effective dated, contains gender, highest ed. level	Insert row
	Identity/Diversity	Not effective dated, contains birthdate, ss#, ethnicity code	Edit/save
	Veteran Status	Not effective dated, contains veteran and disability information	Edit/save
	Citizenship	Not effective dated, IRSO will maintain this data as necessary	Edit/save
	LBNL Personal Data	Not effective dated, contains release address and UC student checkbox	Edit/save
	LBNL Directory	Not effective dated, contains mailstop, bldg., room, workphone	Edit/save
Job Data	Work Location	Effective dated, contains effective date, action, reason, work location, and supervisor	PAF or payroll
	Job Information	Effective dated, contains Job code, empl class, std hrs, full/pt time, etc.	PAF or payroll
	LBNL Miscellaneous	Effective dated, contains union code, confidential, HEERA status, comments	PAF or payroll
	Payroll	Effective dated, contains FICA status, paygroup, etc.	PAF or payroll
	Job Data Salplan	Effective dated, contains salary grade	PAF or payroll
	Compensation	Effective dated, contains combrate, calculated hrly, mthly, annual rates	PAF or payroll
	GSRA Data	Effective dated, contains summary GSRA data, student id, student type, units. GRSA only.	PAF or payroll
	Dept Info	Effective dated, contains Level 0, 1, 2, 3, 4 Orgcode data	PAF or Div Orgcode Data page
	Purchase Order Info	Effective dated contains PO info. Used for contract workers only.	PAF or payroll

Continues on next page....

The Components and Tabs (continued)...

Component	Page (Tab)	Description	How Updated
Employment Data	Employment Data	Not effective dated, contains dates primary actions, service, seniority, appt end date, and business title.	Edit/save or Insert row
	Employment Dta2	Not effective dated, contains PI status, Designated Official, Service Award type and date, etc.	Edit/save
	LBNL Guest	Not effective dated, contains Guest appointment information. Used for guests only.	Edit/save
Benefits Program Particip	Benefits Progr Particip	Effective dated contains benefit program and date.	Insert row
Identification Data	Citizenship/Passport	Multiple data rows, contains US Citizenship Status, Passport data, County of Citizenship.	Insert Row or Edit/save. Updated by IRSO only
	Visa/Permit Data	Effective dated contains Visa data.	Insert Row. Updated by IRSO only
	Visa Comments	Effective dated contains Visa data.	Updated by IRSO only
Emergency Contact	Contact Address/Phone	Multiple data rows, contains name and address for emerg contacts	Insert Row or Edit/save
	Other Phone Numbers	Multiple data rows, contains phone contact info for emerg contacts	Insert Row or Edit/save
Track Education	Track Education	Multiple data rows, contains degree, major, school, date, verified	Insert Row or Edit/save.